



INTERNATIONAL COLLEGE OF  
FINANCIAL PLANNING  
*RULE THE WORLD OF FINANCE*



Become A Dynamic Force In Financial Advisory

# Registered Financial Prosperity Advisor (RFPA)



Powered by  
 **BAJAJ CAPITAL**

**ASSURED PRE-PLACEMENT AND JOB OFFER;  
RIGHT AT THE TIME OF ADMISSION!**

**FIRST TIME IN INDIA / RIDE THE WAVE OF UNLIMITED GROWTH & EXCITING OPPORTUNITIES**

# Registered Financial Prosperity Advisor (RFPA)



RFPA is a uniquely crafted industry-integrated short-term program empowering aspirants with super-specialized skill-set to transform into a dynamic multi-product advisor, helping clients become wealthy and lead prosperous lives. The program provides expert understanding of Financial Planning, Asset Allocation, Popular Investment products, Insurance Planning and Taxation aspects.

RFPA empowers you to become job ready and opening doors for a promising career as a Front line Sales Executive dealing with Financial Products and wealth Management in the Banking, Financial Services and Insurance (BFSI) Sector. By enrolling into this program, you get years ahead of the competition.

Don't miss the opportunity to join India's leading Industry-Integrated Course in Financial Advisory – the RFPA Program from ICOFP



## On completion of the 1-month RFPA course, you step ahead with:

- » 3 months OJT with Bajaj Capital.
- » Comprehensive knowledge of Financial Planning, Investments including mutual funds and Insurance for Wealth protection
- » Start a promising career in Risk Management and Financial Advisory



## COURSE CURRICULUM ● ● ●

RFPFA is a comprehensive program designed to transform aspirants into multi-product expert Financial Advisors. This is possible as you are trained on basics of Goal-based Financial Planning, Investment decision-making using Asset Allocation, in-depth knowledge of Indian Investment Product spectrum, including Mutual Funds. Program also covers risk management for client wealth using Life and Health Insurance. Curriculum includes Industry first training on Neuro-Linguistic Programming, to help make more meaningful client engagements and improving success rates.

## COURSE DELIVERY ● ● ●

The One Month RFPFA Program will be delivered in a dynamic hybrid format. The first 15 days will focus on core concepts through live online sessions (on Zoom), ensuring flexibility. This will be followed by 15 days of in-campus sessions designed to build practical skills and provide hands-on exposure to real-world scenarios

## STUDY MODULES ● ● ●

### 1 FOUNDATION

Learn the basics of Finance to prepare you for further advanced learning.

- » Introduction to Finance
  - Overview of Financial Markets
  - Basic Economic Concepts
  - Stock Exchange and Indices



### 2 CORE LEARNING

#### 1 Personal Financial Management

- » Personal Financial Situation
- » Time Value of Money
  - Power of compounding
- » Cash Flow and Conflicting Demands
- » Budget and Prioritization
- » Debt and Financing Alternatives
  - Understand & evaluate CIBIL Score
- » Financial Management Strategies
- » Popular Savings/Investment Products in India

#### 2 Mutual Funds

- » Advantages of Mutual Funds
- » Basic of Terminology - NFO, UNITS, NAV, Exit Load, TER
- » Schemes & Return According to Investment Objective
- » Systematic Approach to Mutual Fund
  - Direct vs. Regular funds = Why advisor is important
- » Case study = How to become a Crorepati using Mutual Funds

#### 3 Investment Planning

- » Major Asset Claim - Equity, Fixed Income Gold, Real Estate
- » Asset Allocation
- » Understand investor risk profile
- » How to prepare a basic Portfolio
- » Wealth Management
- » Behavioral Finance

#### 4 Insurance

- » Principles of Risk Management
- » Fundamental Principles of Insurance
- » Risk Exposures & Life Insurance
- » Health & Personal Accident Insurance
- » Auto Insurance

#### 5 Taxation

- » Deductions under Chapter VI A of Income Tax Act (Old Tax Regime)
- » Tax Treatment of Mutual Funds, Insurance



### 3 SKILL DEVELOPMENT

Once you complete learning, next in line is to be prepared for the corporate world and get practical exposure.

- » Behavioral Training
- » On-the-Job-Training (OJT)
- » Neuro-Linguistic Programming
- » Foundation Training, customised for the Job Role to include sales pitch, product positioning, mastering client onboarding techniques and building strong, long-term client relationships



# 12 REASONS WHY YOU MUST ENROLL INTO THE Registered Financial Prosperity Advisor (RFPA)



## 1 PLACEMENT

At the time of joining the program itself, you grab a Pre-Placement Job Offer. A Job-in-hand relieves stress as no more job hunting is needed after you finish the program. Your job is confirmed on Day 1.



## 2 INDUSTRY INTEGRATED

Unlike a traditional MBA/ PG Diploma program, RFPA is not just a theoretical classroom learning program; but imparts on-the-job real-world practical learning and building relevant skills.



## 3 1+3 MODEL

One month of rigorous training (15 days online + 15 days classes @ ICOFP Delhi Campus), followed by three months of paid internship (₹15K per month for 3 months) at Bajaj Capital.



## 4 RAPID CAREER GROWTH

RFPA is a Shot in the arm to witness faster career growth when compared to other co-workers who are uninitiated. Happy clients & fulfilling career is a win-win situation.



## 5 SHORT & INTENSE

The course curriculum is relevant and precise as per the industry's need and prepares you well as compared to the usual 2-3 years programs that would consume a lot of precious time & cost, at times even losing Industry relevance



## 6 TOP-NOTCH FACULTY

You are taught by experts who bring along decades of experience from both the corporate and academic world, giving you a practical industry-oriented learning experience.



## 7 QUICK ROI

Your investment of ₹40,000/- for the RFPA course paid at the time of joining is recovered within just 3 months of internship.



## 8 SPECIALIST CURRICULUM

The curriculum specializes in Financial planning, Investment product short listing, Risk management using Insurance and integrates top certifications, to make you an Expert.



## 9 AFFORDABLE FEE PLANS

The program is not only available at a very low fee but also has Interest free student loan options.



## 10 NISM (VA) CERTIFICATION

Candidates undergo SEBI NISM (VA) Mutual Fund Distributors Module training to master asset management, regulations, and mutual fund strategies, enabling them to provide expert client guidance.



## 11 BUNIYAD TRAINING

A specially curated program designed to help candidates master product pitching, align solutions with client needs, and build long-term client relationships.



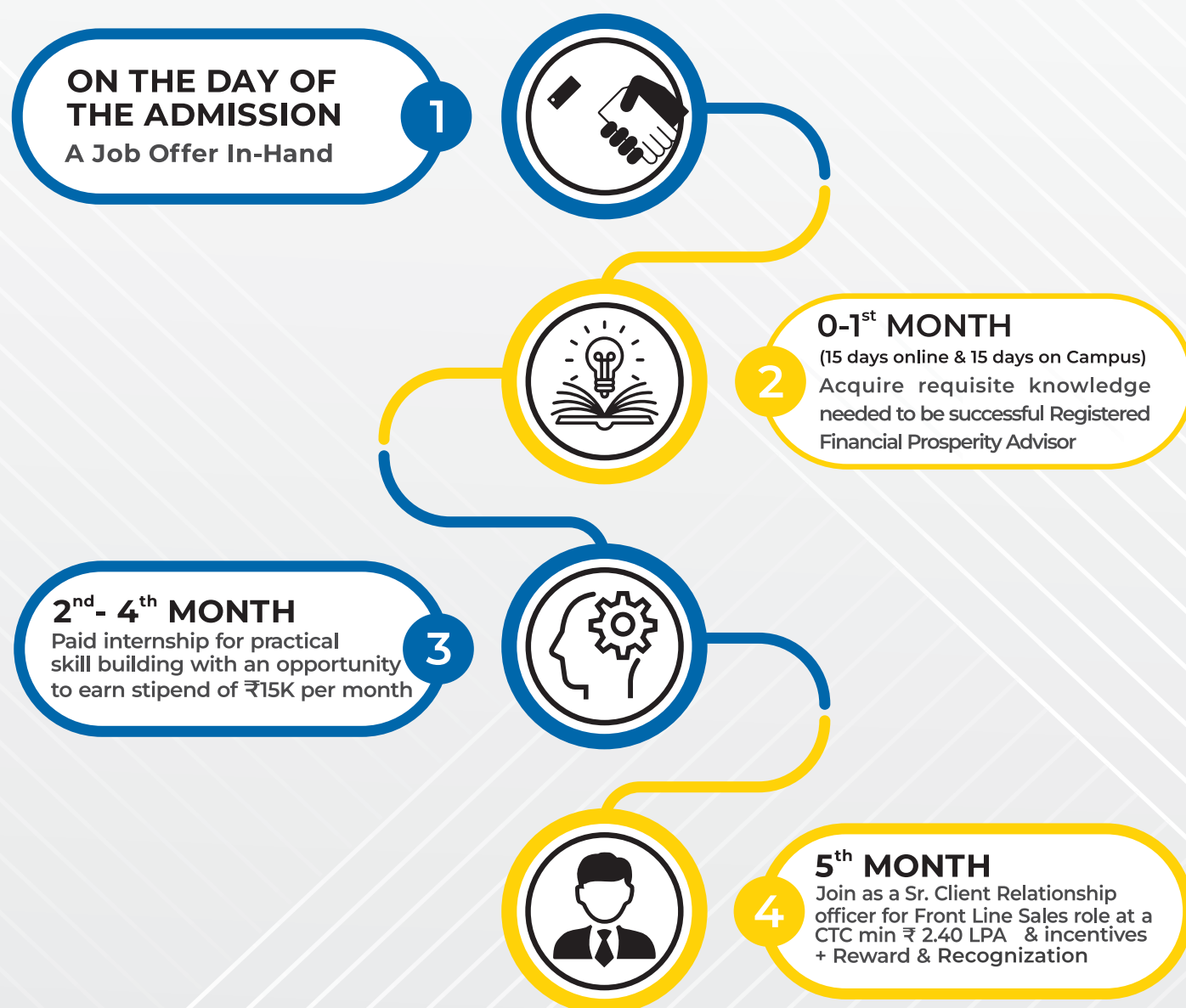
## 12 BAJAJ CAPITAL LINEAGE

We are a part of the esteemed Bajaj Capital Group, one of India's leading financial services companies for 60 years and 5000+ employees PAN India.





# A Successful Career In Registered Financial Prosperity Advisor (RFPA) AWAITS YOU!



## COURSE FEE



The course fee is ₹40,000/-, payable to ICOFP by the student, with any additional examination fees to be paid directly by the student to the certifying bodies. ICOFP will provide accommodation and food for the 15-day classes at ICOFP Campus. However, students are responsible for covering their own travel costs to and from Delhi.



**Interest FREE**

**Student Loan Option Available!**

*Pay ₹15,000/- at the time of Admission and balance through a student loan at 0% Interest through NBFC Partner.*



**Note:** The fees paid by the student will be refunded after successful completion of 12 months employment at Bajaj Capital.



# WHAT DOES IT FEEL LIKE TO BE PURSUING RFPA AT INTERNATIONAL COLLEGE OF FINANCIAL PLANNING?



## Student's Corner



I always wanted to pursue a career in the BFSI Sector. Being a graduate, while undergoing interview rounds, one common question coming up was that I do not have the requisite skill-set to be productive from Day 1. Finding a solution to this problem led me to the RFPA Program from ICOFP. After undergoing this program successfully, I am happily placed at Bajaj Capital. Now my dream of doing a job in my favourite BFSI Sector is a reality.

— Disha Awasthi



I have 2 years of experience in the Insurance Industry. When meeting clients, there was always a feeling that an expert knowledge of diverse Investment Products is missing that would have helped me address client requirements holistically. ICOFP's RFPA Program was the right fit to my requirement as it has helped me become an expert multi-product financial advisor. My confidence to do great in my new role is 10X!!



Ritvik Sen —



Coming from a Science Background seemed a hindrance when I dreamt of making a career in the Growing Indian Finance Sector. It turned out to be a misnomer when I heard about the RFPA Program from ICOFP. The curriculum design and the teaching methodology of the expert faculty did not deter me anywhere compared to students from finance backgrounds. In fact, my analytical skills were a strength to successfully clear the program. I am placed today with Bajaj Capital and have many happy clients.

— Ashwani Dwivedi

## ABOUT US!



### **ICOFP- International College of Financial Planning!**

The International College of Financial Planning is an educational initiative of Bajaj Capital Group. Established in the year 2002, ICOFP is India's most awarded super-specialized finance college offering international programs in finance such as CFP & CFA. The world's topmost program in personal finance - Certified Financial Planner (CFP), was brought to India by ICOFP, and today we are India's 1<sup>st</sup> and largest CFP Education Provider.

## ABOUT BAJAJ CAPITAL!



Bajaj Capital is one of India's leading financial services companies with a legacy of 6 Decades in the financial services industry. It stands tall with a formidable strength of 5000+ employees PAN India.

Bajaj Capital is a tech-driven Wealth Management company serving Retail, HNIs, Corporates, and Institutional clients.

### TO ENQUIRE

**CALL NOW: 9711450520**

### **International College of Financial Planning**

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 [www.icofp.org](http://www.icofp.org)

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Disclaimer: Final placement will be subject to your performance/ discipline/ commitment during internship.